WISCONSIN WOOD

MARKETING BULLETIN

WISCONSIN DEPT. OF NATURAL RESOURCES

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WOOD MARKETING BULLETIN

The Wisconsin DNR publishes the "Wisconsin Wood" marketing bulletin every three months. It serves the timber producing and wood using industries of Wisconsin by listing items: For sale - forest products, equipment and services, wanted - forest products, equipment and services; employment opportunities. There is no charge for the Bulletin or inserting items in it. Only items deemed appropriate to the timber producing and wood processing industries will be listed. Also the Bulletin will feature forest products utilization and marketing news, safety notes, coming events, new literature, tips to the industry, and listing or employment wanted or positions that are available.

If you know of someone who would like to be on the Bulletin mailing list, please ask them to send their name, address and zip code to the return address on the back page. Also, if you have items to list, send in the form or write a letter to the return address on the back page. Repeat listing of items requires a written request each time the item is to be repeated.

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Coming Events

EXPORTING FROM THE LAKE STATES: UNDERSTANDING THE LOGISTICS AND MARKETS FOR LOG AND LUMBER EXPORTING JULY 20TH, GREEN BAY, WISCONSIN

Mark your calendars for Tuesday, July 20th. The State Lumber Association Education, Inc. will host an export seminar in Green Bay, Wisconsin. The keynote speaker, Michael Snow, from the American Hardwood Export Council will discuss strategies for successful wood products exports. M&I Bank and M.E. Dey and Company will cover the details behind international banking and payment as well as freight forwarding issues. This seminar will be useful to wood products companies interested in developing export markets as well as those that wish to expand their current exports. For LSLA members $50 for first employee and $35 for each additional employee and for non-members the registration is $75 per employee.

Send registration form and payment to
LSLA Education
3071 Voyager Drive, Suite E
Green Bay, Wisconsin 54311
Phone 888-213-2397
email: lsla@lsla.com .

HARDWOOD LUMBER GRADING SHORT COURSE, JULY 21, 22 AND 23, 2010

The Hardwood Lumber Grading Short Course – which will be held July 21, 22 and 23, 2010 at Northcentral Technical College in Antigo, Wisconsin is sponsored by LSLA Education and UW-Extension. This class is targeted for the beginner and and therefore will be ideal for sawyers, edgermen, trimmermen, grading trainees, sales people, managers, and supervisors. Members of Lake States Lumber Association are encouraged to take advantage of this opportunity to provide employee training and to support the mission of Lake States Lumber Association, LOCATION, Northcentral Technical College, 312 Forrest Avenue, Antigo, Wisconsin.
Registration Fee:
$200 for Lakes States Lumber Association Members, $300 for non-members, fee includes NHLA Rule Book and NHLA training, manual, coffee and soda breaks, lunches, certificate of completion for all students. Seminar is limited to first 30 registrations.
Send registration form and payment to
LSLA Education
3071 Voyager Drive, Suite E
Green Bay, Wisconsin 54311
Phone 888-213-2397
email: lsla@lsla.com

FOREST PRODUCTS UTILIZATION AND MARKETING: TIMBER MARKETS

This one day workshop focuses on utilization and marketing of forest products as a tool to help accomplish forest management and provide revenue to landowners and land managers. The morning session will include updates on current resources and markets for traditional forest products, biomass, carbon credits and agro-forestry. Also included will be technology options for informing product appraisal and sorting decisions. The afternoon will consist of a field session at a logging site to discuss utilization and marketing items such as timber sale terms, assimilation of new technologies; logger decisions on marketing and sorting, and how to get full value for timber from your forest management operation in light of current market conditions and emerging biomass markets.
Tuesday, July 27, 2010
8:00 am to 4:00 pm
Blandin Foundation Auditorium
100 North Pokegama Avenue
Grand Rapids, MN
$30 FPS Members
$65 SFEC Members
$135 SFEC Non-members
Co-sponsored by SFEC, MN, DNR, UM, UMD, USFS and Forest Products Society
Register Online: http://sfec.cfans.umn.edu
Or Contact: Lisa Breuer, lmbreuer@umn.edu

THE 33RD ANNUAL KILN DRYING SHORT COURSE WILL BE HELD AUGUST 16-19, 2010 AT THE UNIVERSITY OF MINNESOTA, ST. PAUL CAMPUS

The University of Minnesota's Department of Bio-products and Bio-systems Engineering sponsors the course in

cooperation with the University of Wisconsin-Madison's Department of Forest Ecology and Management, and the Great Lakes Kiln Drying Association.

The course is designed to provide basic training for dry kiln operators and supervisors, but anyone desiring to learn more about kiln construction, kiln operation and wood-moisture relations is welcome and encouraged to attend. No previous drying experience or training is necessary.

Instruction will include lectures, demonstrations and "hands on" kiln drying experience. Conventional kiln drying of hardwood lumber will be emphasized; however, dehumidification drying, solar drying and air-drying will also be covered. Ample time will be available for group interaction as well as individual consultation.

For more information contact:
Harlan Peterson
Department of Bioproducts and Biosystems Engineering
University of Minnesota
2004 Folwell Avenue
St. Paul, MN 55108
Phone: (612) 624-3407
Fax: (612) 625-6286
E-mail: harlan@umn.edu
Website: http://www.bbe/umn.edu/kdsc

HOUSING MARKET SHOW SIGNS OF RECOVERY

Washington- the U.S. housing market is on the road to recovery but that road will not be without bumps over the coming month and it will likely take two more years before new housing starts reach normal levels.

In recent weeks, the National Association of home builder has released several positive reports about housing trends, Including:

Builder confidence in the market for newly built single family homes, as measured by the NAHB/Wells Fargo Housing Market Index, rose for a second consecutive month in May to its highest level in two years.

Nationwide, housing starts rose 5.8% to a seasonally adjusted annual rate of 672,000 units in April as the deadline for the first home buyer tax incentive arrived.

Single-family housing starts surged 10.2%to a seasonally adjusted annual rate of 593,000 units in April the strongest rate since August of 2008.

Three out of four regions posted solid gains in new housing production in April. Combined single and multifamily starts rose 23.9%in the Northeast, 16.7% in the Midwest and 7.0% in the South. (The West registered a 13.3% decline)

Housing Upswing: The NAHB held its Construction Forecast Conference Webinar May 18, featuring a panel of economists who analyze the housing market.

"Home buyer tax credits clearly did their job and got people back into the marketplace," said NAHB Chief Economist David Crowe. With the expiration of the tax credits in April, Crowe said the housing momentum is being carried forward by low interest rates, pent up household formations, stabilizing prices and budding employment growth.

However, many factors continue to drag on housing at this time – including the critical shortage of credit for new and existing projects, competition from short sales and foreclosures and regional economic disparities. The availability of acquisition, development and construction financing remains a major concern as the industry moves forward, Crowe said.

Building starts: NAHB is forecasting 552,000 single family starts in 2010, up 25% from last year's 445,000 level, which was the lowest annual output since 1959 when the government began collecting this data. Suffering from an acute shortage of available financing and a significant shadow inventory of homes lost to foreclosure that are competing against normal inventory, Crow said that multifamily housing starts are expecting to lose further ground this year, falling 18 percent to 93,000 units before rebounding to 150,000 units in 2011.

Mark Zanddi, chief economist of Moody's Analytics, said that housing will improve as the job market does. He forecast that the economy will average monthly job gains of 125,000 this year, 250,000 in 2011 and over 300,000 in 2012. Zandi forecast that overall housing starts will total 700,000 units this , close to 1 million in 2011 and 1.7 million by 2012, which he describes as close to trend and consistent with demographics in a normal functioning economy.

Source: Cossets Magazine May/June 2010

WHAT WILL HAPPEN TO THE HOUSING MARKET WHEN TAX CREDITS EXPIRE?

With the housing sector being such a critical piece of the U.S. forest products industry, many want to know when it will rebound. The good news is that housing appears to be stabilizing, which means that prices have stopped falling. This is due in large part to a variety of stimulus packages and tax credits that are temporary although they were recently extended to the end of May.

The big question is, "What will happen to the housing market after the tax credits stop?" Most analysts agree that the overall U.S. economy, particularly consumer spending, must get much healthier if a housing recovery is to have legs. Much of consumer spending is tied to optimism regarding the job market. Unfortunately, that is going to take time to fully recover because unemployment is expected to remain high through 2010.

Realistically, once the stimulus money is gone, housing prices must still come down further in some markets before a complete recovery can sustain itself. The housing market is likely to have some bumpy numbers over the next year as the tax credits end and the market finds the real bottom. House prices are being propped up by various programs, and I believe this only delays a meaningful and sustainable housing recovery.

Another huge question mark is what will happen when/if the federal government decides to reduce its level of support for Fannie Mae and Freddie Mac. Both are government-sponsored enterprises (GSEs) that have been heavily involved in the housing market for over a quarter of a century. The Treasury Department has covered $111 billion worth of their losses so far. Many have argued these measures were necessary to prevent a collapse of the U.S. housing market. But, some question whether the U.S. government will be able to keep up this pace indefinitely as the GSEs lose billions each year. Eventually, the market is going to have to move to a more stable solution. In fact, more articles are appearing calling for reform in the residential mortgage markets with special emphasis on mortgage servicing, including counseling. Regulators have been paralyzed as they search for a better solution and the right time to enact it. But you don't want to make the wrong change at the wrong time.

Consumer spending remains suspect as unemployment stays at 10%. People are less likely to want to buy a home if they don't feel confident about their employment. The unemployment situation is clearly improving. If this continues, the economy will rebound and housing will strengthen. The unemployment situation is

probably the single largest indicator to watch as a sign of long-term, sustainable growth in the overall economy.

Okay, there is some good news. I believe we have turned the corner, both with the U.S. economy and housing. Things seem to have reached a plateau or in some cases are improving. Our financial system is still a bit shaky, and will remain riskaverse (a fancy word for continuing credit tightness) until capital ratios improve. This means that companies and consumers will still struggle to get loans in many cases, which may keep some from buying a home or expanding their business.

Looking specifically at housing numbers, total starts were down 4% in December, reaching an annual rate of 574,000. The good news was the 11% increase in total permits and the 8.3% increase in single family permits. The increase in permits is good, but this is a fairly natural occurrence with the spring building season approaching. Starts are still terrible despite mortgage rates now dipping below 6%. But at least the market is headed in the right direction.

D. R. Horton, on the country's largest new homebuilders, recently reported that during the three months that ended December 31, 2009, its net sales orders were 45% higher than a year ago. This represents the second consecutive quarter of growth from the comparable prior year quarter.

Horton warned, "Our sales and gross profit could be severely impacted by prolonged weakness in the economy and continued high levels of unemployment as well as by the scheduled expiration of the homebuyer federal tax credit in June 2010, and the announced end of the Fed's open market purchases of mortgage-backed securities in March 2010."

This once again points to the uncertainty of what will happen when federal dollars flowing into the housing situation are curtailed.

Basic laws of supply and demand are at work in the market. A large inventory of existing homes continues to grow, which means there are a lot more sellers than buyers even though the number of buyers has increased over recent lows.

Demand depends on price and affordability. Affordability is a function of mortgage rates and household income. Supply (new construction) is partly a function of cost, but the real problem today is supply in the resale market. Foreclosures were up 28% in 2009 versus 2008. This adds to downward price pressure by adding to the housing inventory.

Resale prices are so low that they are making it extremely difficult for new home builders to compete. Until foreclosures stabilize, this action will continue. Another factor affecting new construction is the price to rent ratios. These are still too high in most cases, which means that renting remains attractive to many potential first-time buyers. Even though house prices are coming down, record rental vacancy rates (currently exceeding 11%) are driving rental rates down too.

House prices must come down to a level where enough people can afford the payments. This means the job picture must improve, and lending must "unthaw". This is happening very slowly – e.g., FHA, a major government mortgage writer, now requires higher down payments. Other lenders are doing the same – in addition, credit checks are getting tougher.

Foreclosures continue at a high rate, and the "shadow inventory" keeps growing. This includes the inventory of homes not officially listed by the banks, plus people who will sell their homes as soon as prices improve; homes currently in foreclosure that will end up on the market; and future homes that will end up in foreclosure. Nobody really knows how high these numbers could go. However, a recent *Wall Street Journal* article (James Hagerty, January 27 – Housing momentum builds, but perils persist), suggests that there are more than seven million households that are behind on mortgage payments or in foreclosure. These results contribute to the continuing disarray in the U.S. mortgage market.

Fannie and Freddie are "wards of the state" – in conservatorship, and the Federal Housing Administration (FHA) is now having problems. They are the group that underwrites/insures almost 100% of the residential mortgages in the U.S. today. Few others, such as the private banks, are in the mortgage business to the degree they use to be.

Mortgage adjustment programs that were designed to keep people in their homes and prevent a glut of further foreclosures have not worked well to date. The federal government was hoping for 7-9 million rewrites, but to date, there have been fewer than 100,000. And half of those rewrites are in trouble again within 6 months of being completed. In many instances, it is financially better (i.e. they lose less month) for the lender to allow the foreclosure than to try to help people stay in their homes.

Bank failures are the worst since the 181 failures in the 1991-92 recession. This is particularly alarming because this indicates that many banks are having problems, which further exacerbates the credit crunch. Troubled banks don't like to lend. This is a big problem for small businesses which, by the way, create most of the jobs in the U.S.

My best guess is that housing will take some time to recover – another two years at least. The government programs to shore up prices, such as mortgage rewrites are not working as well as expected. The 30-year mortgage is currently hovering near 5%, yet not enough people are buying. Many don't have jobs (or good enough jobs – many are "under-employed) and can't meet down payment requirements. Low rents compete with starter homes, and first-time homebuyers just so happen to be purchasing over half of the homes sold in the past 12 months. These factors indicate that a protracted recovery is the most likely scenario. Things may get worse before they get better depending on how far the market drops once the government tax credit programs expire.

The biggest bright spot in the horizon is long-term demographics. The birthrate and the immigration trends continue to point to a strong housing market in the United States with a solid base of housing demand. I believe demand will eventually again reach 1.5 – 1.8 million housing starts on an annual basis. When will we get there? Well, your guess is likely as good as mine. Keep a watch on the inventory levels, the home prices and the unemployment rate in your area to know when things truly are back to normal.

By Al Schuler is a research economist with the U.S. Department of Agriculture in West Virginia. He can be reached by e-mail at aschuler@fs.fed.us

Source: *Pallet Enterprise*, March 2010

WILL ICT BE THE DEATH OF THE PAPER INDUSTRY?

Mark Rushton, Editor, Pulp & Paper International

First of all what is ICT? I only really found out myself last month when I was asked to chair a seminar at the Confederation of European Paper Industries' (CEPI) Brussels headquarters entitled: Paper & ICT – Co-existing in a Sustainable Society.

Basically ICT stands for information communication technology and ecompases all those e-reading gadgets that are becoming all the rage, as well as everything you can read and view on them, including emails, (but now of course books, newspapers and magazines). The CEPI seminar revolved around the presentation by Dr Peter Arnfalk – ICT – Paper interplay and its environmental implications. Arnfalck – ICT – Paper Interplan and its Environmental Implication. Arnfalk is associated professor at Lund University in Sweden, and has no affiliation with the paper industry. In short, it is an in-depth report that was commissioned by CEPI to just what effect e-communications is having on the paper industry, particularly from an environmental standpoint.

Here are just some of the interesting statistics Arnfalk unearthed in the course of his research:

If it was supposed that 430 billion mail items that are delivered globally each year were two sheets of A4 laid end to end, the to1l would add up to a journey to the sun and back.

If the 15 trillion emails that are sent annually were also 2 A4 sized emails, it would add up to a return journey to the sun 70 times over.

There are also around 60 trillion spam emails annually; that's 280 trips to the sun and back.

Which begs the question: What environmental foot print is the greatest, emails or postal mail? That is one that in spam – is about 4.9 grams. A spam email equates to 3 grams, because these are not often opened which where the main energy usage comes from when reading emails.

Arnfalk's conclusion is that the traditional letter is 2 to 6 times more costly from an environmental perspective; however, due to the massive uptake of using email – up to 40 times more than traditional mailings – the total environmental footprint is up to 20 time heavier.

Of course, the report goes into much greater depth about other causes for concern, e.g. the fact that these devices are made using "almost the entire periodic table" and that " when totaled up, the production and running of ICT equates to 2% of the global emissions of CO2, which is equivalent to the athat of the airline industry, and it is set to grow at a huge rate, almost double by 2020"

And what a raging storm the subject has created since (online that is!). We published a brief report on the seminar and its results which were posted online at the RISI website, as well as sending the report out with our Mills and Technology email, and to some of the business media sites including LinkedIn. The Passionate response we have had from pulp and paper people around the world has been really encouraging. It also goes to prove that ICT has invaded our lives in this industry as any other. The response the threat of ITC range from an all out attack on large consumer companies that are putting the messages: "Think about the environment, don't print this message", to others of a more capitulating nature, whish is that "we have to accept that progress in progress – and through a big PR campaign might stall the progress - let's concentrate on what we can do well: packaging and tissue.

Well, clearly there is going to be ongoing and further debate on this subject. As for us at RISI, we are continuing to support and celebrate this illustrious industry with the second of the PPI Awards, following on from the successful launch last year. We have the judges and full criteria in, and I am delighted to report that we already have a number of high quality entries. Don't miss this fantastic opportunity to get your company, mill, or personnel recognized for the truly remarkable efforts being made in the global pulp and paper industry operating in the 21st Century.

You can view the criteria and enter the PPI awards at ppiawards.com and the ICT articles can be read on the RISI.com website, by searching ICT.

Source: Pulp & Paper International (PPI) June 2010

U.S. PRINTING-WRITING PAPER SHIPMENTS, CONTAINERBOARD PRODUCTION, UP AGAIN IN JANUARY

Total U.S. printing-writing paper shipments increased 9% in January 2009 – the third consecutive year-ago increase, according to the American Forest & Paper Association's January 2010 Printing-Writing Paper Report.

The report showed that three of the four major printing-writing grades recorded double-digit growth when compared to 2009.

U.S. purchases (shipments + imports – exports) of printing-writing papers also increased in January, up 4% versus year-ago January, AF&PA said.

Total printing-writing paper inventory levels increased 9,800 tons from December – an increase of 1%.

Some additional highlights from AF&PA's report include: uncoated free sheet shipments up versus year-ago for second consecutive month; coated free sheet shipments hit double-digit growth versus year-ago for second month; year-ago shipments of coated mechanical reaches double-digit growth for third consecutive month; and uncoated mechanical shipments surge compared to last January.

Containerboard. According to AF&PA's January 2010 U.S. Containerboard Statistics Report, total containerboard production increased sharply, up 335,500 tons, or 13.8%, when compared to January 2009. This follows an upward trend set in December 2009.

Containerboard production in January increased compared to December 2009, and the daily average percent change was up 1.1%, the report showed.

Operating rates for January 2010 rose 15.3 points to 93.1% over January 2009.

Linerboard. Linerboard production also saw a large increase over last year, rising 14.1% from January 2009. The current linerboard production saw a slight increase compared to December 2009 and the daily average rose 1.5%. Once again production for exports showed a substantial increase of 72.4% over this time last year, but was down 11.7% compared to December 2009, AF&PA said.

Linerboard's January operating rate mirrors the rise, increasing 15.0 points to 92.5%.

Medium. Medium production in January 2010 was up 88,600 tons or 12.9% from same month last year. Production was flat compared to December 2009, which was reflected in the daily average percent change which rose just 0.1%. Exports as well, showed a sizeable increase, posting a 33.2% growth over January 2009.

The January medium operating rate showed the largest gain increasing 16.3 points over January 2009.

NOTE: The operating rates and capacity for January 2010 have been adjusted to reflect the permanent closure of the following Smurfit-Stone Container mills, Missoula, Montana and Ontonagon, Michigan. The data have been prorated to account for the number of operating days in January.

Source: *PaperAge*, March/April 2010

TIMBER SALE CONTRACTS AND AMENDMENTS

Everybody has heard timber sales should have a written contract. Still, that area is one of the most common to be lacking when loggers are audited for the Master Logger Certification program.

When the Master Logger Certification program was first started, a Master Logger Certification timber sale contract was developed in an attempt to have a document that was both short and comprehensive. Although it is shorter than many contracts, it is still three pages in length, but with only a few areas to fill. This is by no means the only contract to be used; instead, it was an attempt to make a contract that was fair to both parties. Many contracts are very biased one way or the other, whereas the intent should be for a contract that protects both parties from misunderstandings and unforeseen events.

Another aspect of timber sale contracts is amendments. For example, when a timber sale is under way and some aspect of the timber sale changes (i.e. sale area becomes larger or smaller, certain species are either supposed to be left or cut, etc.), and it is agreed to verbally without amending the original contract. Though it may seem like a simple adjustment to the contract to both parties, without a written amendment, the original contract is legally binding and you could be held in violation of the contract even though there was a verbal agreement to change the contract.

I have had many loggers tell me timber sale changes happen fairly regularly with foresters (agency, industrial, or consultants) where they will direct a logger to change some aspect of the original contract without any written amendment. Amendments become increasingly important on larger timber sales where there is a possibility of dealing with more than one forester and a verbal agreement from one forester might not be known by the next. Again, the original written contract would be the legal position. Having fill-in contract amendment with you can easily clarify and document any proposed changes to the original contract.

For a copy of the Wisconsin Master Logger sample timber sale contract and amendment document, please visit the Wisconsin Master Logger Certification website: www.wimlc.com.

By Don Peterson. Source: *GLTPA*, February 2010

AMENDED LACEY ACT ENFORCEMENT BEGINS NEXT PHASE

Washington – Initial enforcement of the amended Lacey Act took affect Thursday, April 1 for a basic information transparency requirements including guitars, revolvers, hand tools, pool cues and certain types of furniture.

The U.S. Lacey Act, amended in May 2008, makes it a federal crime to trade in illegal wood products. Under a phased-in process, many sectors also have to declare the scientific name and the country of harvest for any plant constituents of their imported products. Other wood product sectors, including those importing sawn timber, flooring, and joinery have been declaring this information to the U.S. government for nearly a year.

Now, an importer of chairs manufactured in Vietnam will declare, for example, that the wooden frame is made of teak (Tectona grandis) from Thailand. Importers of billiards equipment might declare that the cocobolo in pool cures (Dalbergia retusa) is from Nicaragua.

This information – collected by USDA's APHIS – will allow the implementing agencies to target enforcement actions and better understand how the U.S. market demand for wood products is affecting forests worldwide. For a full list of sectors included in the April 1 phase-in, visit **APHIS.**

"The declaration requirement of the Lacey Act is a critically important part of achieving greater supply chain transparency and legality, the over-arching goals set forth by Lacey," said Alexander von Bismarck of the Environmental Investigation Agency. "For the first time, companies are required by law to ask basic questions about their supply chains and understand exactly where their wood comes from."

Full enforcement of the ban on trade in illegal wood has been in effect since the law passed on May 22, 2008. The first public enforcement action occurred in November 2009 when the government raided Gibson Guitar facilities in Nashville, Tennessee.

"Companies are really starting to wake up the intent and value of this law," said von Bismarck, noting that awareness levels appear to be significantly higher among sectors submitting declarations.

The declaration form can be found on the APHIS website. Importers must print and mail it to APHIS or submit the information electronically via an automated broker interface. It is expected that an electronic interface will become publicly available in the future as the U.S. government continues to refine its implementation of the Lacey Act.

Source: *Woodworking network*, April 2010

LEAD PAINT RULES CONCERN REMODELERS

Washington – The National Association of Home Builders and Window & Door Dealers Alliance are among industry groups to voice concern over the Environmental Protection Agency's Renovation, Repair and Painting Rules.

The WDDA has asked that enforcement be delayed from its scheduled April 22 start date and that an "opt-out" provision be implemented to exempt homes where no children under six years of age are in residence.

The regulation aims to reduce the exposure to lead paint and requires the use of lead-safe practices for all renovation, repair and painting projects in homes, childcare facilities and schools built before 1978. The EPA must certify the contractors who are doing the work. Violators can be fined up to $37,500 per day.

According to the WDDA, "EPA has not done due diligence to inform and educate renovators about it. If the effective date is not postponed, on April 22 more than 200,000 remodelers will be in violation of the law and subject to draconian fines."

According to a release by the NAHB, the EPA has only approved 135 training providers and certified approximately 14,000 renovators in lead-safe work practices. "Our local home building associations are offering certification classes to their members, but EPA hasn't approved enough trainers to enable our members and other contractors to be certified on time. That's going to put remodelers and their customers in quite a bind," said Donna Shirey, NAHB's remodelers chairperson.

Source: *Closets Magazine*, March/April 2010

FORMALDEHYDE BILL INTRODUCED TO HOUSE

Washington – The Formaldehyde Standards for Composite Wood Act, H.R. 4805, was introduced into the House of Representatives on March 11, 2010.

The legislation, introduced by Representatives Doris Matsui (D-CA) and Vernon Ehlers (R-MI), directs the

Environmental Protection Agency to establish a national emission standard under the Toxic Substances Control Act.

Under the proposed legislation, particleboard, MDF and hardwood plywood made or sold in the United States – and products made from them - would have to meet the formaldehyde emission ceilings in California's recently-adopted emissions standard. The amended legislation calls for EPA to act by January 1, 2012, with the regulation to go into effect 180 days after promulgation. If passed by Congress, this will give the United States one of the toughest production standards in the world.

The legislation is supported by the Sierra Club and numerous trade associations, including the Composite Panel Assn., Kitchen Cabinet Manufacturers Assn. and the Business and Institutional Furniture Manufacturers Assn. Intl.

Source: *Closets Magazine*, March/April 2010

TRENDS IN SECONDARY HARDWOOD PROCESSING EMPLOYMENT

What Do They Imply for Hardwood Lumber Demand?

The following article is submitted by Bill Luppold and Matt Bumgardner, USDA Forest Service, Northern Research Station.

By nearly any measure, the first decade of the 21st century has been a difficult period for the hardwood lumber industry. Between 1999 and 2003, U.S. eastern hardwood lumber production declined by 1.6 million board feet (13%), the first time since the early 20th century that production declined for four straight years. This initial decline in production (and demand) was the result of the closure of domestic furniture plans that could not compete with Chinese imports and the liquidation of lumber inventories at these plants. The decline was compounded by a recession that started in the summer of 2000 and ended in the spring of 2002. Domestic furniture production continued to decline in 2003, but by 2004 this decline was countered by increased growth in construction and refinishing products.

The increase in consumption and production of hardwood lumber that began in 2004 was driven by a continual increase in housing starts, the size of new homes, and the amount of wood cabinets, floors, and millwork used in construction. It appeared then that the demand for building and construction products would propel the hardwood lumber industry into profitability in the 21st century. This relatively good market continued into 2005; however, housing starts peaked in May of that year and started trending downward. By 2006 the housing market was in serious trouble, declining by 65% between May 2005 and December 2007. This decline was a major reason the U.S. economy went into recession in December 2007.

To examine what has happened to hardwood lumber demand (and subsequently the overall hardwood market) in the current century, we will examine changes in employment for major secondary wood production industries (adjusted for weekly hours worked and productivity). However, the change in employment only loosely equates to changes in hardwood lumber demand because it does not allow for the substitution of particleboard, plywood, industrial softwood lumber, medium-density fiberboard (MDF), plastics, and other products for lumber. For industries that also consume large volumes of softwood lumber, such as millwork, the ratio of softwood to hardwood material continues to change over time. The substitution of panel products for lumber and the ratio of hardwood versus softwood products can be isolated by examining the periodic Census of Manufacturers. Unfortunately, the last Census year on record is 2002, and the 2007 data may not be fully published until the summer of 2010. Thus, this information was not available for this analysis.

In this examination we will focus on three periods: first quarter of 1999 to fourth quarter of 2005, fourth quarter of 2005 to fourth quarter of 2007, and fourth quarter of 2007 to third quarter of 2009. We will also examine the cumulative change over all these periods from the first quarter of 1999 to the third quarter of 2009. The first period corresponds to the initial decline in the wood furniture industry to the peak of the U.S. housing boom as reflected in employment trends in the millwork, flooring, and kitchen cabinet industries. The second period corresponds to the initial decline in the housing market. The third period corresponds to the recession that began in December 2007 and ended in late summer 2009.

1999 to 2005

Between 1999 and 2005, the durable goods manufacturing sector of the U.S. economy grew very slowly, in part due to the recession of 2000-2002, increased imports of numerous products from China, and subsequent closing of domestic manufacturing facilities. The low growth in overall durable goods manufacturing is reflected in a low rate of growth in the pallet and container sector. In fact, pallets and containers tracked closely with overall U.S. manufacturing across all time periods measured.

Not unexpectedly, there was a large (40%) decline in adjusted employment for the wood household furniture industry and a small decline in the upholstered furniture industry. The relatively small decline in adjusted employment for the upholstered furniture industry belies the fact that imports of these products more than doubled between 1999 and 2005. Predictably, adjusted employment in the wood kitchen cabinet industry, wood window and door, flooring, and wood office furniture industry grew by 70, 48, 15 and 20 percent, respectively. Much of the increase in the wood office furniture sector during this period was in custom office products that included both built-in furniture and millwork, computer work desks, and office furniture made from composite products.

2000 to 2007

The decline in housing starts that occurred between June 2005 and December 2007 is reflected in the adjusted employment of wood window and door, flooring and other millwork, and kitchen cabinet sectors. Declines in adjusted employment in the upholstered and wood household furniture sectors reflect continual increases in the importation of these products. By contrast, adjusted employment in the pallet and container sector increased by 18% between 2005 and December 2007. The adjusted employment numbers continued to increase in the wood office furniture sector, potentially as the result of the continued strength of the nonresidential construction market (even as residential construction began to decline) and because of the associated need for new furniture for computer work stations and desks.

2007 to 2009

While the decline in housing starts and subsequent job losses in the construction industry was a major factor in the initiation of the recession that began in December 2007, other important factors were high energy costs, large declines in home values, high levels of home foreclosures, declines in the value of widely held stocks and the subsequent loss of consumer confidence. While most economists

believe the recession ended in the summer or early fall of 2009, the 19-month time span was the longest period of depressed economic growth since the 43-month decline that occurred in the Great Depression of 1929 to 1933. The continual anemic housing market associated with the 2007 to 2009 recession – and continued importation of wood household and other furniture – caused steep declines in employment across all sectors of secondary hardwood products manufacturing.

The greatest decline among all the industries that consume hardwood lumber was in the kitchen cabinet industry. The 44% decline in adjusted employment by this industry between December 2007 and September 2009, in addition to the losses that occurred between 2005 and 2007, translates into at least a 700-million board foot reduction in hardwood lumber demand by this industry. Furthermore, reduced U.S. consumption and the continual importation of Chinese furniture contributed to a 40% decrease in employment in the wood household furniture industry.

Employment in the once-healthy wood office furniture sector also declined by 36% between December 2007 and September 2009. While declines in employment in the window and door, flooring, and upholstered furniture sectors were slightly lower than those in the cabinet, wood household furniture, and office furniture industries, they still exceeded declines in overall durable good manufacturing. The decline in pallet industry productivity-adjusted employment, by contrast, was less than that of durable goods manufacturing.

Late 2009 to Early 2010

Between September and December 2009, employment by the flooring, upholstered furniture, and wood household furniture industries stabilized, while changes in employment in the wood office furniture and kitchen cabinet industries were erratic. By contrast, employment in the wood window and door and pallet industries decreased but at a lower rate than in the early part of 2009. Whether recent trends are indicative of future growth is contingent on a number of unpredictable factors. Regardless, it is unlikely that employment by secondary wood manufacturers and subsequent lumber demand will continue to decline at the rates experienced in late 2008 and early 2009.

Although hardwood lumber demand has stabilized in recent months, the changes in hardwood lumber demand that occurred between the first quarter of 1999 and the third quarter of 2009 devastated the hardwood lumber industry. The decline in lumber demand is probably greater than adjusted employment because of the substitution of non-wood and composite products for lumber over this period. The largest declines were experienced by the wood household and upholstered furniture industries, smaller declines were associated with home construction (window and door, flooring and kitchen cabinets).

The industry least affected by the changing economy was the pallet industry. While it cannot be demonstrated with BLS statistics, the demand for crossties also has apparently increased. These changes have reduced the demand for graded lumber relative to the demand for low grade material. It is difficult to forecast if this trend will continue; still, it is a situation that should be closely monitored by the hardwood industry because it will influence mill location, the type of machinery purchased for capital improvement, and the quality of logs processed.

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JOHN DEERE'S STUMP TREATMENT – A NEW BUSINESS OPPORTUNITY By Dr. Ed Brindley, President

What Is Annosus Root Disease?

Many of our readers may feel like I did when we received an interview article from John Deere about annosus root rot disease (ARR). I was not familiar with annosus root rot and suspect that quite a few of our readers have at most a passing knowledge of it.

ARR is a disease that prefers deep sandy and sandy-loam soils that are common along the Southeastern coastal regions. It generally enters a timber stand after a thinning. Airborne spores land on a freshly cut stump, germinate, and grow into the stump and its roots, rotting the roots as the fungus grows. The infection becomes a problem when the infected root of a cut tree is in contact with the roots of a healthy standing tree. The fungus will grow into the standing trees' roots and the tree will flood the infected root with resin to wall off the fungus. If enough roots of the standing tree are infected, the tree will die. Infection can also start through wounded roots due to firebreak plowing, food plot maintenance, or wild hog feeding.

The ARR fungus is slow growing, usually growing less than one meter per year. Tree loss due to ARR typically will last seven years after the thinning. The most losses come three to five years after thinning, and the disease is normally inactive after 10 years.

To try an avoid annosus root rot, thinning is recommended during the summer when fewer spores are produced.

ARR is a commercially important disease of all conifers; loblolly and slash pine are the most severely affected. It typically enters the tree through a wound, grows through the heartwood into the roots, and causes decay in the root system.

After identifying ARR in a few stands, strongly suspect it in other stands if there is some combination of the following conditions: 1) pine stands with dead and dying trees often in clusters or rows, 2) trees leaning or blown over from lack of supporting roots, 3) stringy white rot of wood in roots and/or butt, 4) sparse crowns with off-color needles, often with abundant cones, 5) resin-soaked root areas with discolored, deed, or rotted end sections, 6) mortality in second or third year following thinning and continuing for several years, and 7) pine stands infested with southern pine beetles or lps bark beetles.

ARR is a serious disease that affects trees throughout the U.S., but it is most serious in the South and the West. ARR can kill trees but also weakens trees making them more susceptible to wind damage and attack by bark beetles. The disease is caused by a fungus that produces shelf-like mushrooms, called conks that are tan or reddish brown on top and white or yellow underneath. Conks are typically produced at the base of a tree; they produce spores that are released and

carried by wind to newly cut stumps or wounds on trees.

In the South and Northeast, dry granular borax has proven to be a successful chemical treatment. Immediately after a tree is cut, borax powder is sprinkled liberally on the stump surface with a salt-shaker-type applicator.

Since freshly cut stumps are the primary source of new infections, reducing the number of thinnings in a stand growing on a high-hazard site will reduce the incidence of annosus root rot. Pine plantations severely infected with ARR should be clear-cut and regenerated. Salvage or improvement cuts in severely damaged stands can increase the incidence of ARR, as well as leave the stand under stocked.

John Deere Introduces ARR Stump Treatment – A New Business Opportunity

Nortrax, the largest John Deere construction and forestry retailer in the United States, brought in the first Deere stump-treatment kit from Finland to Aaron Burmeister of Burmeister Logging in Seymour, Wisconsin, near Navarino, Wisconsin. Wisconsin is on the frontline of a global battle against annosus root rot.

While there are treatment methods in place, Aaron decided to approach Nortrax and John Deere to see if they could help him find a better solution. ARR was discovered in Wisconsin about six years ago in the Golden Sands region that runs from Marinette down towards a region just north of Madison. It gets into red, white and Scotch pine.

Landowners and the Department of Natural Resources in that area were concerned about the ARR and discussed the need for a stump treatment. When he purchased a new John Deere harvester in 2008, Aaron decided to get their stump-treatment kit as well. He was hoping to be ahead of the curve and be the go-to-guy for cutting red pine.

Aaron said that he has won some logging jobs because he provided the Deere stumpage treatment system. Initially only Wisconsin stand lands were requiring treatment, but consultant foresters are now putting out bids that require it as well.

The Deere stump treatment system features a 26 gallon tank mounted on the side of the cab, between the tracks, to minimize exposure and reduce damage. The line feed a borax-based solution to the specialized saw bar, delivering the fungicide through a row of holes during each cut.

DNR regional managers are starting to really push ARR treatment because they do not know how long ARR will stay in the soil even after all the infected trees are dead and gone. There are some reports stating it may be 100 years or more before you can safely grow pine again.

Since annosus is occurring in droughty soils, where the affected pine species are planted, you typically can't convert it to farmland. The reason the trees are there in the first place is the land couldn't sustain crops for farming. There is a need to maintain the land in some kind of timber.

Previously treatment involved a back-pack or some type of fruit sprayer or sprinkling granulars with a shaker type technique.

Aaron is now using John Deere's treatment method with a 26 gallon tank mounted on his John Deere 1270D Harvester. Aaron uses this system to spray stumps during the cutting process. The old way of coming in after cutting the trees misses some stumps because they can't be found through the tops and slash.

Aaron said, "I get 100% coverage, I can also put down herbicide and kill the stumps of invasive species, just the opposite of what we're trying to go with pine. With annosus, we're treating a stump to keep the fungus from getting in. But with a species like black locust, for example, we don't want it to sprout. We put down Garlon 4 because we want that stump gone. With pine we spray with Cellu-Treat, a baron-type chemical, to prevent ARR."

The person in the seat applying the chemical needs an applicator's license, and the company needs to be licensed as a business. Aaron said, "As a logger in the cab spraying, I need to be licensed. And as Burmeister Logging I need to be licensed."

Aaron indicates that a 26 gallon tank typically lasts about two eight-hour shifts. Using a Deere spraying system saves the labor and time that used to be spent walking around and spraying.

When asked who sets the regulations for handling Cellu-Treat, Aaron responded , "The Department of Agriculture, Trade & Consumer Protection is the national organization that regulates the chemical. Wisconsin has really taken the lead on annosus root rot. Other states that have it may not worry about it. They're going to take their losses and move on. Wisconsin has decided to try and control this for as long as possible, which is consistent with its approach to other diseases."

While Deere initially developed its stump treatment kit for the European market, Aaron's experience has demonstrated that the system works just as well in the United States. Highlights of the design include an easy-to-install and remove bar along with tanks mounted within the tracks to reduce the risk of damage to the unit. The tanks hold the borax-based solution, which is sprayed through holes in the saw bar, ensuring complete coverage at the time of cutting.

This method of combating annosus root rot involves treating the stump immediately after cutting with a borax-based product, like the granular Sporax or spraying with Cellu-Treat.

Source: *TimberLine*, May 2010

ROLLERCOASTER RIDE IN RECOVERED PAPER CONTINUES

There is no doubt that people who get queasy riding on a rollercoaster should not be involved in the recovered paper market. In the first half of 2008, recovered paper prices reached their highest levels since 1995 in nominal terms, then plunged to their lowest levels since the late 1990s in the latter part of 2008, again in nominal terms. Prices started back up in the first half of 2009 and jumped all the way back to 2008 highs again in the early part of this year. All of this action on the pricing front occurred while world demand for recovered paper fell by only a little over 2% in 2009 and is now recovering by probably around 5% in the current year.

Much of the fluctuation in prices relates to the nearly-vertical short-term supply curve for recovered paper.

The vertical nature of the short-term supply curve is set by the amount of collection capacity in place at any given time. At this point, there is still quite a bit of paper and board that ends up in the landfill, at least in countries such as the US. However, there is only a certain amount of collection capacity available, such as curbside programs, material recovery facilities, etc. When demand for recovered paper reaches the in-place collection capacity, there is no where to go but up for prices until marginal users of recovered paper switch to alternatives or new collection capacity is added.

Strong demand from Chinese papermakers kept world recovered paper demand bumping up against the vertical portion of the supply curve, especially

from late 2006 through mid-2008. There was some choppiness in monthly pricing, reflecting short periods of inventory drawdown on the part of papermakers, but the trend during this period was for pricing to ratchet steadily upward.

Recovered paper pricing then proceeded to collapse in the second half of 2008. The precipitating event was a sharp reduction in Chinese imports of recovered paper in the latter part of the year. At the same time, suppliers were geared up to run the in-place collection systems at a high rate due to the strong pricing of recovered paper earlier in the year. Also, potential supplies of recovered paper just kept on coming because underlying consumption of paper and board continued, albeit at a reduced rate due to the downturn in the general economy.

All of a sudden, the vertical supply curve became a slippery slope as demand plunged, dragging prices down toward underlying cost levels. This is where recovered paper differs from other commodities, except for other recyclables. The cost floor is actually negative, at least for bulk grades, because generators of recovered paper must pay to have their paper and board taken to a landfill instead of recycled.

In the second half of 2009, recovered paper demand in the developed world started to recover, while Chinese demand remained robust. Recovered paper pricing remained on a strong upward track in this environment, although OCC prices did wobble a little in the latter part of 2009 due to some seasonal destocking on the part of the Chinese papermakers and a shift toward virgin containerboard production in the USA as producers attempted to capitalize on the black liquor tax credit.

Recovered paper pricing entered an explosive phase in the early part of this year, especially in the case of OCC. The delivered price of OCC into the Chinese market from the US eclipsed the high point reached the all-time high reached in March 2008 of this year and nearly the all-time attained in early 1995. US demand for recovered paper jumped in the early part of 2010 due to the expiration of the black liquor tax credits and limitations on virgin fiber supplies in the US South as a result of wet weather. At the same time, Chinese demand remained strong and European demand continued to recover.

The recovered paper market has cooled again recently as papermakers have cut back on their inventory purchases in the face of the very high prices reached in March and drier weather has returned to the U.S. South. However, our positive outlook for the general economy would indicate that papermakers will have to resume purchasing recovered paper in larger quantities shortly. In addition, a substantial amount of new, recycled-based paper and board capacity is being prepared for startup in China in the latter part of 2010 and recovered paper inventories will have to be built in advance. At this point, it appears that the short-term supply curve will be tested yet again in the near future.
By Rod Young, Chief Economic Advisor, ryoung@risi.com
Source: *Pulp & Paper International (PPI)*, May 2010

FOR SALE

Timber and Forest Products

For sale – 3 hackberry logs. Contact Thomas Middaugh, W2524 County Road S, Maiden Rock, Wisconsin 54750, Phone (715) 448-4601.

Silt fence post and construction form stakes. Contact Clark LLC, 260 East 18th Street, Dubuque, Iowa 52001, Phone (563) 52001 (563) 582-5102.

1,000 BF cedar, 500 red, 500 white, logs or lumber. Delivered Clinton, Wisconsin area, Rock County. Contact Joseph Percente LLC, Phone (262) 248-1259.

Equipment

Like new stainless steel tanks for distillation of mint oil which should increase yield and improve color over steel tanks. Also have two steel tanks in need of repair. All tanks 12' long x 8' wide x 7' high. Manufactured by Gminder Welding Company, Marshall, Wisconsin. Pictures on request. Contact Melvin Teal, P.O. Box 85, Highway USH 2 & 41, Bark River, Michigan 49807. Phone (906) 466-9978.

Slightly used fas trac model #307 left hand band sawblade sharpener. For immediate shipment. Sharpen 2-1/2" to 7" wide bands – for blades 20 ft. length and under. Contact Harry R. Schell Sawmill Sales & Supplies, Inc., 601 West Park Street, Blue River, Wisconsin 53518. Phone toll free: 1-800-462-5807 Fax (608) 537-2032 e-mail: hrschell@mwt.net

Hydraulic sawmill carriages – Mudata setworks, tower dogs, cant turndowns, many unique features. Contact: Jackson Lumber Harvester Company, Inc., 830 North State Road 37, Mondovi, Wisconsin 54755. Phone (715) 926-3816, Fax (715) 926-4545, Web: www.jacksonlbrharvester.com

Services for Sale

Circular, band (wide and narrow) and carbide sawblade repair. Contact Harry R. Schell Sawmill Sales & Supplies, Inc., 601 West Park Street , Blue River, Wisconsin 53518. Phone toll free 1-800-462-5807 Fax (608) 537-2032, e-mail: hrschell@wmt.net

WANTED TO BUY

Timber and Forest Products

Black Locust wanted (Southern half of Wis.)—Standing timber, on the landing, or milled lumber. Logs must be sawmill size-lengths 8'-6" to 16'-6". Standing timber must be 16+DBH. Please email sales@WD4$U.us or call Chuck at 608-778-4348.

Equipment

Manual production items wanted—gang rip saw, re-saw, pencil stake pointer. Any power source. Please email chuckyager@att.net .

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If you want to list items, fill in the form below:

FOR SALE		WANTED TO BUY		SERVICES		EMPLOYMENT		
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EQUIPMENT	☐	EQUIPMENT	☐	WANTED	☐	WANTED	☐	MAILING LIST ☐

NAME -- DATE ---

ADDRESS---COUNTY ---

CITY -- ZIP CODE -----------------------------------PHONE AC (-----) ---

WISCONSIN LOCAL-USE DIMENSION LUMBER GRADING

A procedure is in place under which Wisconsin sawmills are able to produce dimension lumber that may be sold without a grade-stamp issued under the authority of a lumber grading bureau, and that lumber may be used in residential construction when directly sold to the person who will inhabit the dwelling (or to a person acting on his or her behalf) and for whom a building permit has been issued. To do this, someone from the mill must attend one of the **Wisconsin Local-Use Dimension Lumber Grading Short-Courses** that are offered for Wisconsin sawmill operators. These one day special short-course training sessions are offered several times a year, at no charge, and are advertised in the WI-DNR's Wisconsin Woods Marketing Bulletin. **Successful completion of this course and successfully passing an associated test is required for anyone that wishes to produce and sell local-use dimension lumber in Wisconsin that will be used in residential construction. This means someone in your company needs to attend the course if you wish to produce Wisconsin Local-Use Dimension Lumber. (Note: Local-use dimension lumber is lumber that is not grade-stamped under the authority of a grading association.)**

If you wish to produce and directly sell Wisconsin Local-Use Dimension Lumber that may be used in residential construction, you will need to get someone from your mill to a course so they be certified (as a representative of your mill). Also if you do custom sawing for anyone who wishes to use the lumber in their dwelling (such as if you have a portable mill and are custom sawing logs for forest landowners who want to use that lumber in building their home), this would apply to you and you also should get the training and get certified.

The next one-day Wisconsin Local-Use Dimension Lumber Grading Short-Course that you can register for will be offered on September 16th and December 2, 2010 at the University of Wisconsin-Stevens Point Wood Lab in Stevens Point WI.

The short-course is one day in length, beginning at 9:00 AM and ending at around 4:30 PM (at the latest).

There will be no fee for attending - HOWEVER - pre-registration is required – there will be NO WALK-IN REGISTRATION - (space is limited to 20 persons maximum for each course to allow for more interactive discussion). Pre-registration for the course must be received before for August 30th for the September class and November 15th for the December class to permit time to confirm registrations, and for mailing all students a grading manual for advance study, and travel directions and other materials.

To register for any of the short-course, you may email, FAX or phone in your registration. Your registration will be confirmed (also by email, FAX, mail or phone) OR you will be informed the course is full.

TO REGISTER:

Email the following information to: RGOVETT@UWSP.EDU (email registration is preferred if possible)

Provide the following information when registering:
1) The full name (or names) of the person (or persons) being registered
2) The company name (if different from the person's name)
3) A complete mailing address (including zip code)
4) Phone number (with area code)

OR if you do not use email you can FAX to: Bob Govett 715-346-4821

OR you can simply phone Bob Govett (715-346-4212) – if you phone in your registration – please be sure to spell out the name and address

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If you wish to use the facilities of the Bulletin, forward a letter, post card or form on page 11 with detailed description of your "wanted" or "for sale" items. All forest products (stumpage, logs, pulpwood, posts, poles, trees and lumber, etc.) and services (custom sawing, custom kiln drying and tree planting, etc.) may be listed. Please be sure your full name, address (including zip code), telephone number accompany your listing, there is no cost for listing any items. If you want items repeated in the next issue, send in a written request. If you have comments about the Bulletin or have suggestions on its content, write to: Forest Products Specialist, 3911 Fish Hatchery Road, Fitchburg, WI 53711, phone (608) 231-9333 FAX (608) 275-3338.

DEADLINE FOR ITEMS TO BE LISTED IS THE 20TH OF: MARCH, JUNE, SEPTEMBER and DECEMBER.

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